



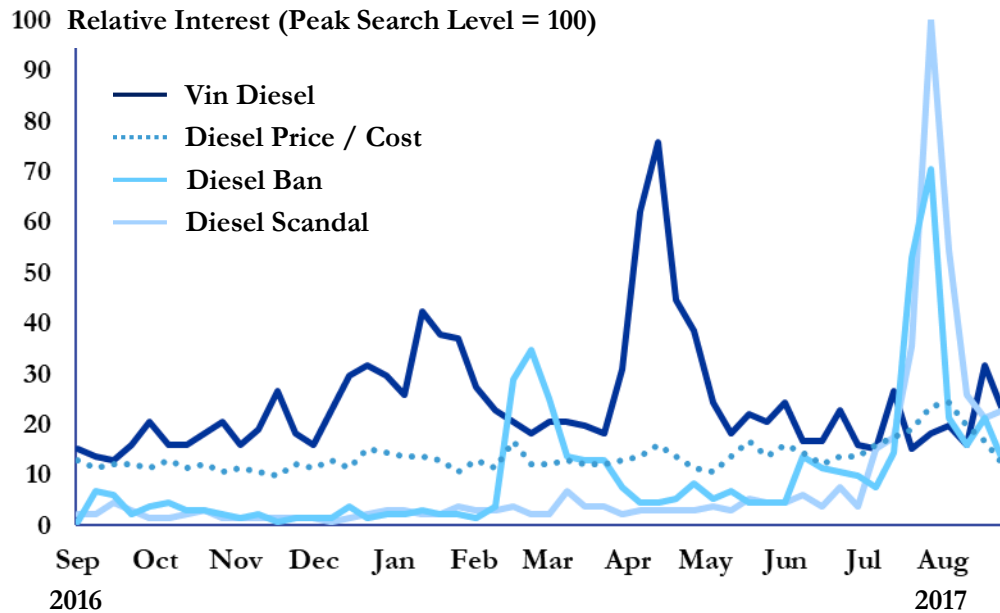
CRISIS? WHAT
CRISIS?

A Light-Hearted View Of Current Attitudes Towards Diesel In Germany

- Since the VW diesel scandal first emerged there has been a constant drumbeat of bad news about diesel vehicles
- OEMs have been forced to issues recalls of vehicles and city bans are being openly contemplated by politicians and pressure groups
- Politicians are concerned about the ability to meet emissions standards without diesel and the ability of the OEMs to offer alternative solutions
- But in the end, this all comes down to whether or not people buy the cars...
- ... Do we really know how much do they actually care?

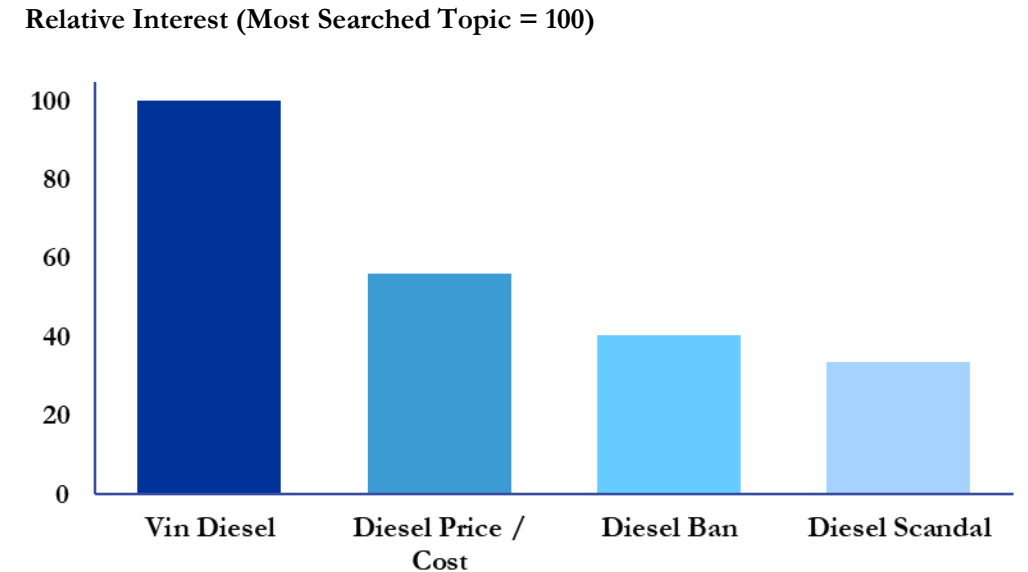
HOW MUCH DO GERMANS CARE ABOUT DIESEL?

INTEREST BY WEEK



Source: Google Trends, Ad Punctum Research

AVERAGE INTEREST -- LAST 12M



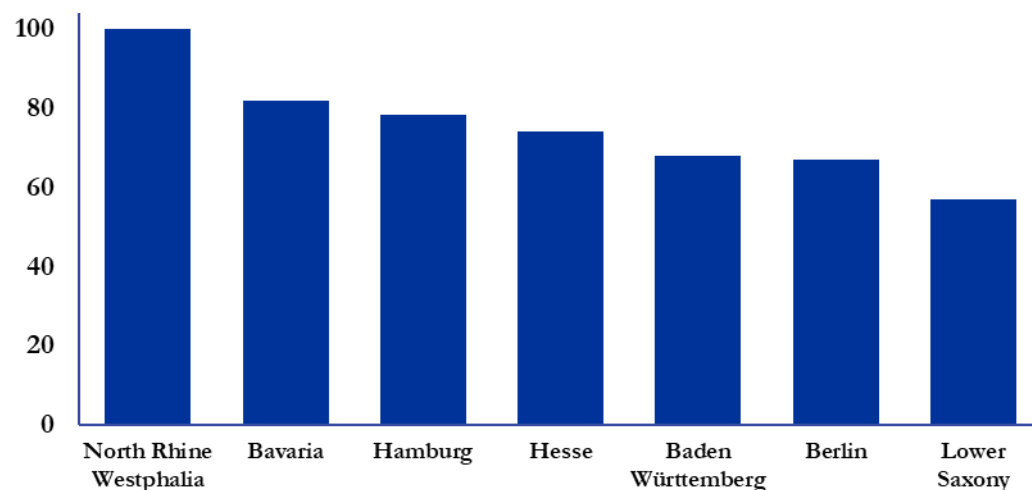
Source: Google Trends, Ad Punctum Research

German Web Searches Peak When There Is Significant News Activity
But Overall Interest Is Consistently Below Gossip About Vin Diesel.

WHO IS MOST CONCERNED ABOUT BANS?

INTEREST IN BANS -- LAST 12M

Relative Interest (Region With Most Searches = 100) -- Selected Regions Only*



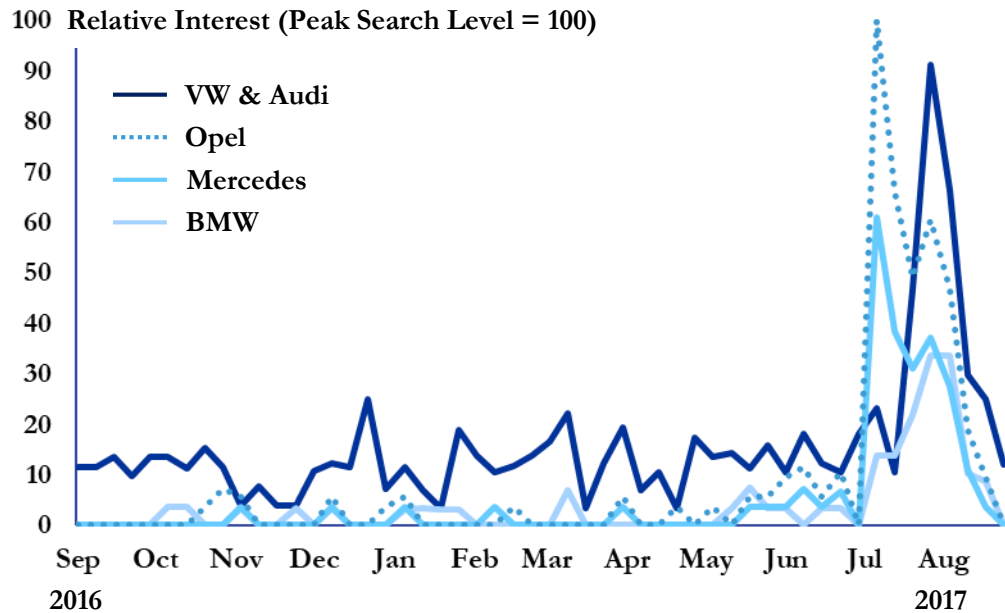
Source: Google Trends, Ad Punctum Research * Excludes Regions with fewer searches than Berlin

- Search activity around diesel bans has recently increased, in line with media reporting
- Although a ban in Stuttgart (Baden-Württemberg) attracts lots of press coverage, locals appear less concerned than other regions
- Greater search volume near bases of Ford (NRW), BMW (Bavaria) and Opel (Hesse) and Daimler (B-W) than VW (Lower Saxony)

Distribution Of Searches Indicates Varying Degrees Of Interest In Finding Out More About Diesel Bans.

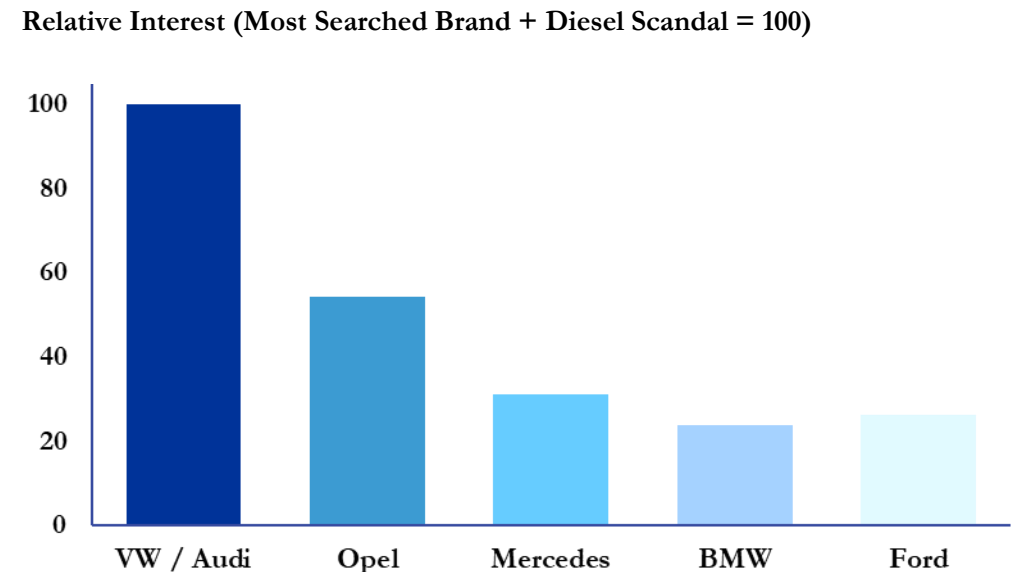
HOW ARE GERMANS VIEWING DIFFERENT BRANDS?

BRAND + DIESEL SCANDAL



Source: Google Trends, Ad Punctum Research

AVERAGE INTEREST -- LAST 12M

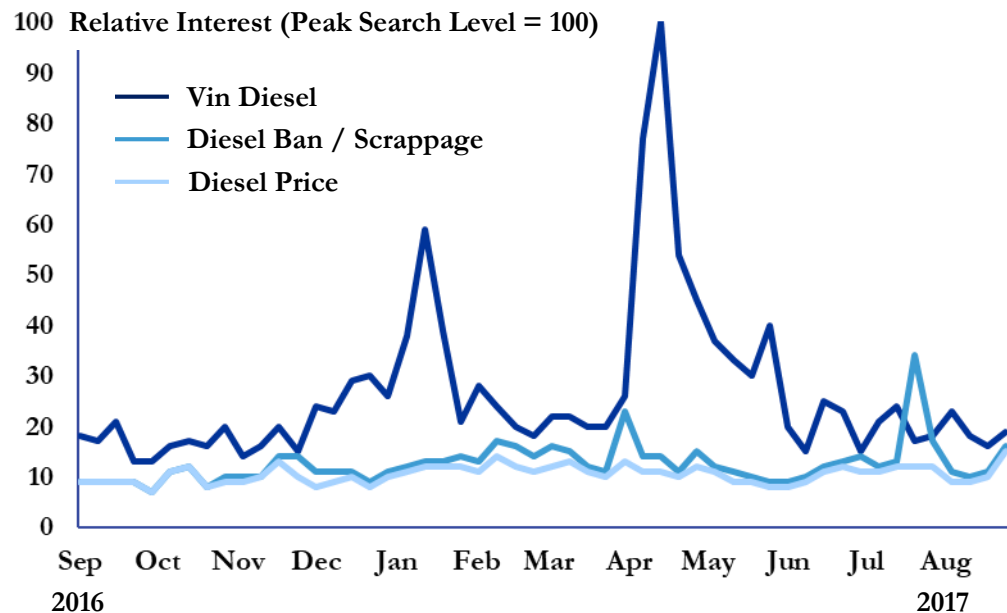


Source: Google Trends, Ad Punctum Research

Search Interest Varies Over Time According To Particular News Stories.
Searches Associate VAG Brands With Diesel Scandal Far More Than Others.

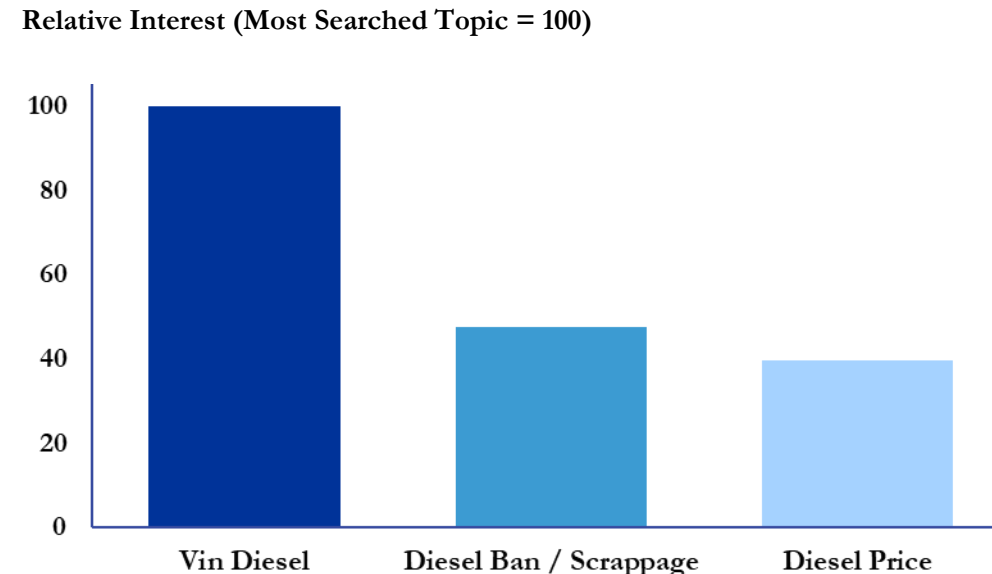
COMPARISON -- WHAT DO THE BRITISH THINK?

INTEREST BY WEEK



Source: Google Trends, Ad Punctum Research

AVERAGE INTEREST -- LAST 12M



Source: Google Trends, Ad Punctum Research

It Seems That, Until His Retirement, Searches For Vin Diesel Will Confound Attempts To Understand Attitudes To Fuel Type In Europe.

- German search records indicate that consumer interest in the diesel scandal and the potential for outright bans is increasing, albeit from a low base
- Clear peaks driven by news stories rather than consistently search volume, indicating diesel ban isn't yet a common purchasing consideration
- Searches about diesel bans are highest in regions with car makers, rather than those seemingly most likely to implement them
- VAG appears to be the only group consistently associated with scandal
- In the UK, web searches show only small growth in interest around diesel bans

- Data was compiled using Google Trends, a tool that creates relative measures of interest based on input parameters such as search term and region
- Data has not been filtered for particular users (e.g. to remove searches by teenage girls and give greater weight to traditional car buying demographics)
- Given the diverse user base, the most interesting data points are often how the trend changes to itself over time
- This is all intended to bring a different view and hopefully be a little bit of fun!
 - Those wishing to make life-or-death decisions based on consumer attitude are advised to run their own proprietary surveys
 - » We can help but you probably know how to do it yourself
 - Yes, we did search German language terms and translate for presentation

- Consultancy and research firm founded by an ex-automotive OEM insider
- Ad Punctum researches emerging trends and key issues ranging from the disruptive impact of on-demand mobility to Brexit
- Periodically publishes relevant research to make it freely available and drive understanding and debate on interesting topics
- Please contact sales@adpunctum.co.uk or visit www.adpunctum.co.uk to learn more about us and discuss any specific queries you might have



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